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Foreign Crops and MARKETS



VOLUME 54

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World Rice Crop for 1946-47 Seen Near-Average, But Surplus Supplies in Asia's "Rice-Bowl" Area May Be Up Only Slightly From Last Year's Low Level (Page 81)

Australian Wool Exports Over Double Last Season's. Larger Shipments to U. S., Continental Europe Reflect Heavy Sales From Stock in 1945-46 (Page 98)

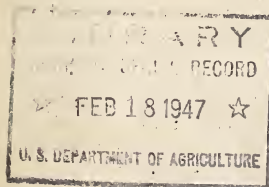
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FOR RELEASE

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L A T E N E W S

Southern Brazil's cotton acreage for 1946-47 is estimated at 3 million acres in the States of Sao Paulo, Paraná, Minas Gerais, and Goyaz, which usually account for over 95 percent of the south Brazil crop. This is an increase of 11 percent over last season. The crop may have been damaged by heavy rains in January. If February weather is good the crop may reach 1,375,000 bales (of 478 pounds each) but some estimates are as low as last year's estimate of around 1,125,000 for these States.

China's 1946 cotton crop is now estimated at 1,360,000 bales of 478 pounds each, compared with an earlier estimate of 1,625,000 and last year's estimate of 1,600,000.

The pyrethrum crop in Kenya Colony, the world's largest producer, is presently suffering from a severe blight, the exact nature of which is unknown, according to reports from Nairobi. So far the blight has affected only certain areas and agricultural scientists are trying to find the exact cause of the infestation in order to prevent its spread and serious damage. Opinion is that the blight has been imported by seeds and bulbs from South Africa. Pyrethrum is a vital component of the solution used in "aerosol" bombs for insect sprays. This country normally takes over three-fourths of the total world production of pyrethrum.

Belgian sugar production for the 1946-47 season totaled 256,000 short tons, compared with 155,000 tons (raw value) last season. Sugar rations are being increased from 1250 to 1400 grams monthly plus 300 grams for jam.

Substantial quantities of frozen foods imported from the United States have appeared recently on Venezuelan food markets, but high prices place such foodstuffs in the luxury class. Prospects for coffee and cacao crops—the two major export crops—have improved considerably. In view of last season's drought imports of 15,000 tons of corn are estimated as needed to meet increased requirements, the result of greater consumption and a larger urban population.

Ceylon has increased export duties effective January 28 as follows: Tea 35 cents a pound; copra ten rupees a hundredweight (\$3.01); coconut oil 16.25 rupees (\$3.92); desiccated coconut 12 rupees a hundredweight (\$3.61); and fresh coconuts 42 rupees per thousand nuts (\$12.66).

Paraguay is expected to sign an agreement with Brazil that is reported to provide for a 6-year minimum supply of 10.9 million yards of Brazilian cotton textiles annually. During the agreement period, Paraguay is said to have agreed to give preference to textiles made and shipped from Brazil.

(Continued on page 101)

WORLD RICE CROP SLIGHTLY BELOW AVERAGE 1/

The 1946-47 world rice crop estimated at 7,100,000,000 bushels, though 11 percent above last season's short crop of 6,400,000,000 bushels, is still 4 percent below the prewar (1935-36 to 1939-40) harvest of 7,400,000,000 bushels. The largest production gain is in the Far East where 95 percent of the world's rice normally is produced.

Substantial increases in China, India, and Japan should improve food shortages in these countries, which are the world's largest producers as well as normally the heaviest importers. In Burma production also increased substantially, but output in all surplus producing countries continued much below prewar. Exportable supplies in 1947, therefore, are expected to exceed only slightly the low level of last year.

Output in Europe is recovering, but it is not yet back to prewar. In the Western Hemisphere, a record production was harvested in North America, but early forecasts of the South American harvest are below the bumper crops of last season.

Asia: So far this season, weather has been favorable for production in most countries of the Far East. China's crop of 2,320,000,000 bushels is estimated to exceed last year's by 200,000,000 bushels, chiefly because of increased production in central China (see page 88). In India, a good crop on near-record acreages, should yield about 15 percent, or 300,000,000 bushels more than the production of 1,960,000,000 bushels of last year. The 1946-47 crop is about 18 percent above prewar (1937-38 to 1941-42), and should exceed to some extent India's prewar rice utilization, as compiled from official Indian statistics.

In Japan, the 1946 crop exceeds the extremely small output of the previous year by 22 percent, or 100,000,000 bushels. The 1946 harvest, however, was only 94 percent of prewar. Imports of 5 billion pounds in terms of brown rice would be required in order to maintain prewar utilization. Requirements for rice in that country have increased because of an increase in population.

Production in the Philippine Islands is up substantially above last year's crop, but is still about 10 percent less than prewar. The 1946-47 crop decreased that country's rice deficit from more than 1 billion pounds to around 450 million pounds in 1947, on the basis of prewar utilization. Faced with the problem of grossly inadequate import supplies in 1946, British Malaya succeeded to some extent in increasing its production. Since its crop normally supplied about one-third of its prewar consumption, however, this country will continue to need considerable rice imports.

1/ The Northern Hemisphere harvests in 1946 are combined with the 1947 production of the Southern Hemisphere countries.

ROUGH RICE: World acreage, yield per acre, and, production, Averages 1930-31 to 1939-40, annual 1944-45 to 1946-47 a/

Continent and country	acres a				Yield per acre				Production			
	Average				Average				Average			
	1930-31	1935-36	1940-45	1945-46	1946-47	1947-48	1948-49	1949-50	1950-51	1951-52	1952-53	1953-54
North America:												
Costa Rica	23	23	25	-	38.3	-	871	839	695	967	-	-
El Salvador	22	25	58	34	34.6	-	314	639	934	759	759	-
Guatemala	6	18	25	-	30.1	-	172	541	673	673	-	-
Honduras	19	-	-	-	22.0	-	34.8	401	1,156	1,156	-	-
Mexico	95	170	167	170	42.2	-	3,478	5,000	5,000	5,000	-	(6,250)
Panama	35	35	91	161	32.0	-	1,360	1,360	1,360	1,360	-	-
United States	885	1,004	1,471	1,494	45.6	-	41,572	49,852	68,151	68,151	-	71,500
Caribbean:												
Cuba	35	45	80	75	72	-	935	965	1,778	1,778	-	2,029
Dominican Republic	65	80	111	111	36.3	-	5,537	2,905	3,150	3,150	-	30,600
Total	1,120	1,400	2,110	2,110	2,250	-	50,900	62,800	85,600	87,400	-	90,600
Europe:												
Bulgaria	18	19	18	15	54.8	-	791	1,041	881	698	-	353
Italy	360	362	314	245	103.9	-	34,139	31,620	24,275	20,000	-	(28,100)
Portugal	39	50	61	45	68.0	-	1,740	3,398	3,116	1,960	-	3,135
Spain	117	118	119	125	96.4	-	14,593	10,600	12,300	10,300	-	10,070
Total (excluding USSR)	540	560	540	460	550	-	51,500	55,100	41,800	33,900	-	46,600
Asia:												
British Malaya	328	384	-	-	43.4	-	10,785	16,225	-	-	-	-
China proper (22 Provinces)	560	574	-	-	74.8	-	22,433	18,577	18,542	20,727	-	21,017
India	316	386	370	370	27.3	-	7,750	11,176	13,700	12,800	-	17,150
Iran	66	78	38	45	61.2	-	3,329	4,776	1,986	2,387	-	2,646
Japan	1,132	1,485	-	-	36.3	-	25,333	27,138	19,115	19,115	-	(235,000)
Korea	4,112	3,838	-	-	27.5	-	38,621	34,534	230,000	134,455	-	(235,000)
Philippines	9,140	9,716	-	-	22.2	-	101,939	109,385	-	-	-	2,320,600
Thailand	4,643	4,918	-	-	30.1	-	6,804,402	7,115,000	6,500,000	5,944,000	-	(15,000)
Total (excluding USSR)	189,970	196,460	194,900	183,600	192,100	-	6,804,402	7,115,000	6,500,000	5,944,000	-	6,707,000

South America:													
Argentina	25	52	128	122	-	59.8	-	1,054	3,112	6,807	7,736	-	-
Brazil	2,074	2,329	-	-	-	28.5	-	58,970	66,449	102,880	115,130	-	-
British Guiana	78	70	93	-	-	50.8	-	3,445	3,559	4,812	-	-	-
Chile	-	26	110	119	83	61.1	-	1,299	1,862	7,862	5,778	-	-
Colombia	114	-	-	-	-	-	-	2,802	3,419	4,853	6,950	-	-
Costa Rica	126	107	-	-	-	42.8	-	2,202	4,578	6,456	7,500	-	-
Ecuador	29	37	31	35	-	46.0	-	1,078	1,703	1,665	1,724	2,947	-
Paraguay	33	11	16	-	-	66.6	-	284	866	1,030	1,423	-	-
Uruguay	2,580	2,390	4,730	4,920	4,870	-	-	75,000	89,200	104,400	160,200	156,000	-
Total													
Africa:													
Egypt	352	463	643	694	656	71.6	69.2	20,876	33,155	39,908	42,454	45,417	-
French West Africa	1,085	1,582	-	-	-	13.4	-	18,087	20,936	-	-	-	-
Madagascar	1,155	1,155	1,334	1,433	1,430	28.5	24.0	54,466	31,823	31,354	37,722	30,290	-
Sierra Leone	3,430	3,900	4,500	4,800	4,800	29.4	-	88,000	104,400	118,000	128,000	128,000	-
Total													
Oceania:													
Australia	21	23	25	28	30	92.0	-	1,639	2,117	1,550	2,524	-	-
Total													
Total world	198,000	205,700	207,400	198,500	205,100	-	-	7,083,000	7,443,000	6,942,000	6,377,000	7,147,000	-

Compiled from official sources, except as noted. Figures shown in parentheses are estimations of the Office of Foreign Agricultural Relations.
 a/ Crops harvested in Northern Hemisphere countries during the latter part of the year, together with those harvested in Southern Hemisphere countries during the first part of the following year. b/ Preliminary. c/ Less than 5-year average. d/ Unofficial. e/ Includes acreage and production in areas regularly reported only comprising about 92 percent of the total rice area of India. f/ Java and Madura only.

Information about Ceylon's rice crop is lacking, but if weather was favorable, production should greatly exceed last year's crop, which was reduced by drought. Substantial rice imports will also continue to be required.

Of the prewar "big three" exporting countries which together exported about 12 billion pounds annually, Burma is the only nation which is showing a return to normal. Through Government encouragement, its 1946-47 acreage increased 1 million acres, and good weather favored high yields. Although the crop is estimated to be above last year's wartime low by 100,000,000 - bushels, or 75 percent, it is not yet three-fourths of prewar. An exportable surplus of 2 billion pounds is estimated to be available for export during 1947.

Although planted acreage in Siam was increased over the small area of the preceding year, drought conditions ruined a large part of the crop at the outset of the season. The area harvested consequently was materially reduced, and the yields per acre were below average. Production is expected to be about the same as last year's crop, which was 55 percent of prewar. Some surplus is reported to be available from this harvest for exportation during 1947. Political conditions in French Indochina make it difficult to estimate that country's current rice production. Indications are, however, that its production is about the same as last year, when it was about 70 percent of prewar. Rice available for export of around 15 percent of prewar is reported from that country.

In the former surplus areas of Korea and Taiwan (Formosa), all of the 1946-47 production is being consumed locally. Korea's production was reduced by fertilizer shortages and flood conditions, and output in the American Zone is reported at 88 percent of the 1940-44 average. Because of a below-average rice crop, a shortage in other grains, and increased population, south Korea will need its entire rice crop for domestic consumption. Taiwan's output, about 35 percent larger than in 1945-46, is ample for domestic needs.

Europe: Production in Europe did not rise in proportion to its increased planted acreage. In the producing countries, the shortage of commercial fertilizers continued to retard progress toward prewar harvests. Total production is estimated at 41 million bushels, compared with 34 million in 1945, and it is still 25 percent less than prewar.

The largest gain occurred in Italy, achieved solely by a 28-percent gain in acreage, since the yield per acre was reported smaller than in 1945. In Spain, acreage was increased 5 percent, but the reduced yield per acre in this country caused a decline in total production. The acreage in Portugal rose by 16 percent and production was substantially larger than last year's crop, a virtual failure.

Africa: The output in the exporting countries of Africa approximates that of last year, or 20 percent above prewar. Egypt's planted acreage remained at its high wartime average, and good weather favored harvesting a near-record crop. Early in the marketing season it was estimated that in

exportable surplus of 440 million pounds would be available, but it would move only if that country were able to obtain adequate imports of other grains in 1947. In Madagascar, the crop was smaller and the exportable surplus, in recent years about 10 million pounds annually, was reported to be less than average.

North America: In North America, a record rice crop was harvested from the largest acreage in history. Production in the United States was 5 percent more than the preceding year's large harvest, and was 43 percent above the prewar average. During the planting season, Mexico's acreage was believed to be larger than in 1945, and weather has been reported favorable.

A slight increase over that of the previous year took place in the production of the Caribbean countries due mainly to a good crop in Cuba. Output in the Dominican Republic was not so large as the preceding year's record crop. Since in this area, imports normally equal approximately 90 percent of the rice consumed, the slight increases in production will have little bearing on import requirements.

Central America: Preliminary estimates indicate that the total production in Central America was slightly below that in 1945-46. Drought at the beginning of the growing season reduced the crop in Nicaragua to about 50 percent of normal. Supplies available for export from that country to other Central American countries in 1947, therefore, should be insignificant.

South America: The size of the South American rice crop will depend on the outcome of Brazil's harvest, which is principally from March to May. Current reports indicate that a large production may be harvested in that country. The acreage in Rio Grande do Sul, Brazil's principal rice-exporting State, is estimated at 494,000 acres, a 10 percent decline from the 551,000 planted a year earlier. Weather in January, however, was reported to be excellent, and a very good crop may be harvested in that State.

In Ecuador, the anticipated increase in acreage in 1947 was prevented by late rains during the planting season, and the production, harvested from May to August, probably will be smaller than last season's crop. The official estimate placed Chilean acreage at 30 percent less than that of 1945-46. In contrast with the poor yields harvested that year, high yields are expected from the current harvest. Production may be as large as last season's and exportable supplies may continue at about the same reduced level.

A bumper crop in British Guiana was 43 percent larger than the prewar average. Exportable supplies from that country to the Caribbean should be as large, if not larger, than in any previous year. Surinam's harvest was almost twice that of the preceding year, and a surplus of about 20 million pounds is reported available for export.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Fred J. Rossiter, L. Thelma Willahan, A. B. Lewis, William E. Cummings, and Kathryn H. Wylie.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

CHILE'S GRAIN CROP SLIGHTLY LARGER

The 1946 grain crop in Chile was slightly larger than last year's production, as the result of a substantial increase in barley production, according to the first forecast of production. The wheat and oats outturns at 33.9 and 5.8 million bushels, respectively, were about the same as in 1945. The barley crop, however, as estimated at 4.9 million bushels, is 15 million bushels, or 43 percent larger than last year's production. The increase results from a substantial rise in acreage seeded to barley as well as from larger yields.

Weather conditions were generally favorable throughout the season, except in the southern area, where rainfall was excessive during the growing season. Some rust damage was reported in certain parts of the country, but disease conditions were said to be less prevalent than usual.

CHILE: Acreage and production of principal grains,
1946 with comparisons

Year	Acreage			Production		
	Wheat	Oats	Barley	Wheat	Oats	Barley
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>acres</u>	<u>acres</u>	<u>acres</u>	<u>acres</u>	<u>acres</u>	<u>acres</u>
Av. 1935-39:	1,963	279	184	31,562	7,670	5,041
1944 ...	1,989	297	132	33,405	7,041	3,680
1945 ...	1,803	198	110	34,176	5,787	3,446
1946 <u>a/</u>	1,873	219	147	33,928	5,815	4,917

Compiled from official sources.

a/ First estimate of production.

Stocks of old wheat were reported to be virtually exhausted at the end of December. An acute shortage of wheat and flour stocks had been reported

throughout December, especially in Santiago where a complete lack of bread was reported on several days. With the new harvest, which began earlier than usual in the north central area, numerous transactions in new wheat were indicated in December. Prices were said to be about at the level of the old-wheat transactions, which, late in the season, averaged around \$2.25 per bushel for unsacked soft wheat, f.o.b. Santiago.

COLOMBIA INCREASES WHEAT IMPORT QUOTA

Colombia's wheat import quota was modified, raising the limit to 2.5 million bushels of wheat annually, by the terms of a law passed in December, 1946. The former quota was about 600,000 bushels per year, the bulk of which was to be imported and distributed by the National Supply Institute. The measure increasing the quota provides that two-thirds of the total may be imported directly by milling establishments located in deficit-producing areas. The legislation also grants the Ministry of Economy authority to fix the minimum price for domestic wheat and the maximum price for flour.

Since Colombia adopted a protectionist policy toward wheat in 1931, it has not been possible to bring domestic wheat production to the level required to fill requirements. As a result, it has been necessary to relax set import quotas in order to bring in imports to meet the country's minimum requirements. The duty on imported wheat is 8 centavos per kilogram, or about \$1.24 per bushel.

SWEDEN'S FALL GRAIN AREA BELOW AVERAGE

The acreage seeded to breadgrains (wheat and rye) in Sweden in the fall of 1946 was about 18 percent smaller than the winter grain seedings of last year. The reduction, though substantial, was not as great as had been feared earlier in the season. Unfavorable weather at seeding time was largely responsible for the decline in the fall-sown area. Swedish officials are hopeful that farmers will make up the arrears by increasing the acreage of spring grains. As is pointed out, however, per-acre yields of winter grains are normally about 30 percent larger than spring grain yields. Even though the full acreage should be seeded, therefore, the reduced proportion of high-yielding winter grain would reduce crop prospects.

The area seeded to winter wheat was reported at 443,000 acres, compared with 538,000 acres seeded in the fall of 1945. The rye seedings were placed at 314,000 acres, as compared with 389,000 a year earlier. As a result of mild weather in November and early December the late-sown grain entered the winter in better condition than was expected earlier in the season. The mild weather also permitted plowing of a near-normal acreage, which would simplify the problem of increased spring sowing.

Excessive rainfall in the late summer and early fall was said to have impaired the quality of the 1946 grain crop. Revised estimates of that crop are shown below.

**SWEDEN: Grain acreage and production,
1946 with comparisons**

Grain	: Average	: 1943	: 1944	: 1945	: 1946
	: 1935-39	: 1,000	: 1,000	: 1,000	: 1,000
	: acres	: acres	: acres	: acres	: acres
<u>Acreage</u>					
Wheat					
Winter	570:	379:	470:	514:	526
Spring	170:	285:	206:	217:	224
Total	740:	664:	676:	731:	750
Rye					
Winter	475:	524:	483:	403:	378
Spring	20:	19:	15:	13:	10
Total	495:	543:	498:	416:	388
Oats	1,641:	1,420:	1,361:	1,341:	1,313
Barley	252:	280:	237:	231:	221
Mixed grain	626:	684:	686:	685:	686
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
<u>Production</u>	: bushels	: bushels	: bushels	: bushels	: bushels
Wheat					
Winter	21,640:	13,116:	15,377:	16,529:	19,260
Spring	4,712:	6,145:	4,564:	4,917:	5,567
Total	26,352:	19,261:	19,941:	21,615:	24,827
Rye					
Winter	14,380:	15,615:	13,783:	10,642:	11,178
Spring	448:	319:	263:	234:	191
Total	14,828:	15,934:	14,046:	10,876:	11,369
Oats	87,198:	58,581:	50,295:	52,003:	52,230
Barley	9,951:	10,684:	8,051:	7,751:	8,487
Mixed grain	628:	545:	519:	510:	563

Compiled from official sources.

**CHINESE RICE CROP
SHOWS INCREASE**

China's 1946 rice harvest of 2,320 million bushels (73 billion pounds milled) is estimated to be about 10 percent larger than the preceding year's crop, and is 5 percent less than the 2,450 million bushels (77 billion pounds) for the 1931-37 average period. Although the 1946 crop in the 15 Provinces of wartime China was substantially larger than in 1945, it was 13 percent below the prewar average. The greatest decline took place in

Szechuan, Kwantung, and Hupeh, all large producing Provinces. This was due chiefly to the drop in acreage, which was caused by enemy occupation, and to wartime planting of other food crops, such as potatoes, in place of rice.

CHINA: Rice acreage and production (rough) in specified Provinces,
1946 with comparisons

Province	Acreage			Production				
	Average: 1931-37:	1945 a/	1946 a/	Average: 1931-37:	1945 a/	1946 a/	Percent of total 1931-37:	1946
	Million: acres	Million: acres	Million: acres	Million: bushels	Million: bushels	Million: bushels	Percent	Percent
Kiangsu	4.5	-	5.6	241	-	312	10	13
Anhui	2.8	-	2.5	116	-	153	5	7
Honan	0.4	-	0.6	15	-	22	1	1
Honan b/	(0.4)	(0.5)	(0.5)	(14)	(20)	(18)	-	-
Hupeh	4.2	-	2.8	139	-	143	8	6
Hupeh b/	(2.8)	(1.7)	(1.8)	(122)	(85)	(88)	-	-
Szechuan	6.7	5.1	5.0	377	274	271	15	12
Yunnan	1.8	1.7	1.7	86	77	78	4	3
Kweichow	1.5	1.2	1.2	63	46	59	3	3
Hunan	4.4	4.1	4.0	254	148	234	10	10
Kiangsi	3.7	4.4	4.4	180	195	223	7	10
Chekiang	4.4	-	4.7	220	-	236	9	10
Chekiang b/ ..	(2.7)	(2.7)	(2.6)	(135)	(118)	(132)	-	-
Fukien	2.1	2.3	2.2	115	110	115	5	5
Kwantung	7.9	6.9	6.7	401	312	317	16	14
Kwangsi	3.8	3.5	3.3	176	122	134	7	6
Total 15	38.0	34.3	33.8	1,933	1,513	1,677	79	72
Provinces b/ ..	48.9	-	45.9	2,453	-	2,321	100	100
Provinces								

Compiled from official statistics, National Agricultural Research Bureau, China.

a/ Preliminary. b/ Excluding districts enemy-occupied during the war.

Substantial increases occurred over prewar production in some areas, however, the largest being in the wartime enemy-occupied Provinces of Kiangsu and Anhwei, and in Kiangsi in central China. Much of this gain was achieved on irrigated land in enemy-occupied areas.

FATS AND OILS

INDIAN SESAME ACREAGE LOWEST IN DECADE

Indian sesame seed acreage for 1946-47 is placed at 2,362,000 acres according to the second official estimate. This is 4 percent less than

the comparable figure for 1945-46 and the smallest in a decade. Indications are that India is reducing sesame acreage in favor of breadgrains.

PERU AIDS DOMESTIC FISH CANNERIES

Peruvian fish processing plants were authorized by a Supreme Resolution of December 1946 to enter into contract with local establishments for the production of sunflower-seed oil, provided that the prices of canned fish for domestic consumption are not increased. The resolution was passed in view of the scarcity of edible oils for use by domestic fish canneries. For control purposes, the canneries or the sunflower-oil producers are required to inform the Bureau of Food Supply regarding the acreage planted to sunflowers, the quantities of oil contracted for, and the names of the mills which will process the oil.

Encouraging the production of edible oils, which will ease Peru's shortage, is expedient because the local cottonseed-oil output is insufficient to meet domestic requirements. At present fish canneries have to import sunflower-seed oil under difficult conditions, and such imports require foreign exchange.

In the past cottonseed oil was the only vegetable oil produced in significant quantities in Peru. Since 1943, however, cottonseed-oil production has decreased as a result of the cotton-acreage-reduction program. Moreover, despite the prohibition of exports of edible cottonseed oil since 1944, the supply has been insufficient for local demands.

Sunflower-seed oil production in the past has been comparatively unimportant. Local authorities desire now to encourage this industry, not only as a means of assisting fish canneries, but also to relieve the edible-oil supply situation in Peru.

ITALIAN OILSEED OUTPUT EXCEEDS PREWAR

Italian oilseed estimates for 1946 indicate increased production above 1945 in flaxseed, rapeseed, and sunflower seed but a decrease in peanut output. Moreover, each crop is considerably greater than the 1935-39 average harvest, as a result of the encouragement given to vegetable-oilseed production during the war years.

The flaxseed crop of 276,000 bushels, while somewhat lower than the harvests of 1943 and 1944, is 37 percent larger than the 1935-39 average. Rapeseed reached a record output of 12,000 tons, 54 percent greater than the 1945 crop and 460 percent greater than the 1935-39 average. The peanut crop, though slightly below the harvest of the previous year, was 169 percent above the prewar average. The greatest expansion during the war occurred in sunflower-seed production, which reached its peak of 18,000 tons in 1944 and declined to 7,700 tons in 1946, compared with an average output of only 25 tons during 1935-39.

ITALY: Production of specified oilseeds,
1946 with comparisons

Year	Flaxseed	Rapeseed	Peanuts	Sunflower seed
	1,000 bushels	Short tons	Short tons	Short tons
Average -				
1935-39	202	a/ 2,183	a/ 1,642	a/ 25
1943	391	b/	c/ 5,512	b/
1944	315	3,336	3,912	18,360
1945	173	7,942	4,854	7,167
1946	276	12,236	4,409	7,716

Compiled from official sources.

a/ Average of less than 5 years. b/ Not available. c/ Office estimate.

COTTON AND OTHER FIBERS

WEEKLY COTTON PRICES
ON FOREIGN MARKETS

COTTON: Spot prices of certain foreign growths
and qualities in specific markets

Market location, kind, and quality	Date	Unit of weight	Unit of currency	Price in: foreign currency	Equivalent U.S. cents per pound
Alexandria	1947	Kantar			
Ashmouni, Good	1-30	99.05 lbs.	Tallari	43.25	36.05
Ashmouni, F.G.F.	1-30	99.05 lbs.	Tallari	39.00	32.51
Giza 7, Good	1-30	99.05 lbs.	Tallari	42.50	35.43
Karnak, Good	1-30	99.05 lbs.	Tallari	42.00	35.01
Karnak, F.G.F.	1-30	99.05 lbs.	Tallari	39.75	33.14
Bombay					
Jarila, Fine	1-30	784 lbs.	Rupee	438.00	16.85
Broach, Fine	1-30	784 lbs.	Rupee	534.00	20.54
Sind American, Fine	1-30	784 lbs.	Rupee	560.00	21.54
Punjab " , 289-F, Fine	1-30	784 lbs.	Rupee	626.00	24.08
Kampala, East African	1-30	784 lbs.	Rupee	850.00	32.69
Buenos Aires		Metric ton			
Type B	2-1	2204.6 lbs.	Peso	2110.00	28.50
Lima		Sp. quintal			
Tanguis, Type 5	2-1	101.4 lbs.	Sol	150.00	22.76
Pima, Type 1 (Nominal)	2-1	101.4 lbs.	Sol	180.00	27.31
Recife		Arroba			
Mata, Type 5	1-31	33.07 lbs.	Cruzeiro	125.00	20.56
Sertao, Type 5	1-31	33.07 lbs.	Cruzeiro	130.00	21.39
Sao Paulo		Arroba			
Sao Paulo, Type 5	1-31	33.07 lbs.	Cruzeiro	146.50	24.10
Torreon		Sp. quintal			
Middling, 15/16"	1-31	101.4 lbs.	Peso	142.00	28.81

Compiled from weekly cables from representatives abroad.

COTTON DELIVERIES RISE IN SOVIET UNION

Great efforts are being made in the Soviet Union to increase cotton production, which declined during the war. By the end of November 1946 the Government is reported to have received 2,242,000 bales of lint cotton (478 pounds to the bales). The State plan for cotton deliveries for 1946 was fulfilled by this date.

Cotton acreage was increased from 1,212,000 hectares (2,995,000 acres) in 1945 to 1,298,500 hectares (3,209,000 acres) in 1946. The 4-year (1935-38) average, however, was 2,048,800 hectares (5,062,600 acres). The Government plan called for the production of 1,662,000 metric tons (2,453,000 bales) of seed cotton with an average yield of 12.8 quintals per hectare (equal to 365 pounds of lint per acre), compared with the official figures of an average yield of 11.4 quintals of seed cotton per hectare (325 pounds of lint per acre) for 1935-38.

A recent report states that the required deliveries of cotton to the Government were at the average rate of 11.7 quintals of seed cotton per hectare (334 pounds of lint per acre). Apparently the State, therefore, has received about 1,519,000 metric tons of seed cotton which at the rate of 32 pounds of lint cotton to 100 pounds of seed cotton would amount to 2,242,000 bales of 478 pounds of lint cotton.

TOBACCO

CANADA MAY INCREASE TOBACCO AREA

The Dominion Provincial Conference has recommended that tobacco plantings in Canada for 1947 be increased to 126,250 acres, or 7 percent larger than the 1946 area of 118,390 acres. The recommendation was made for the purpose of increasing the supply to meet domestic and foreign demands, and for stock replacement. If the proposed acreage is actually planted, production this year may reach 140 million pounds, compared with last season's record outturn of 134.4 million pounds.

The minimum average price established for the 1946 crop of flue-cured in Ontario was 35.33 cents per pound. The estimated average price received by growers is reported to be 36.75 cents. Prices ranged from 17.28 cents per pound for inferior quality leaf to a top of 69.13 cents for the best grade. The minimum average price for Ontario Burley from the 1946 crop was fixed at 27 cents per pound, an increase of 2 cents over the 1945 price.

Exports of leaf tobacco from Canada during the period October 1945-September 1946 totaled 12.1 million pounds. The United Kingdom and British Possessions took practically all the exports. Exports of flue-cured leaf totaled 9.5 million pounds and Burley 1.4 million. In 1944-45, exports amounted to 17 million pounds, but record exports occurred in 1938-39, when 34 million pounds of leaf were shipped abroad. The large 1946 crop

should provide substantial quantities for foreign purchasers, and the export quota for 1946-47 has been set at 25 million pounds--practically all flue-cured.

During the crop year October 1945-September 1946, about 74.1 million pounds of tobacco (redried weight) were taken for manufacture in Canada, compared with 77 million for the previous 12 months. Reduced takings of flue-cured accounted for the decline. Per capita consumption of cigarettes rose from 630 in 1939 to 1,255 in 1945. Consumption of cigars increased from 12 to 18 per capita during the same period.

ARGENTINA HARVESTS RECORD TOBACCO CROP

The fourth estimate of Argentina's 1945-46 tobacco production places the crop at a record 61.8 million pounds, or 33 percent larger than the 46.4 million pounds in 1944-45. Native types are reported to have made up about 46.5 million pounds of the 1945-46 outturn.

Production of foreign-seed types, amounting to 15.3 million pounds was comprised chiefly of Virginia-seed flue-cured, Kentucky-seed, and Bahia-seed. The flue-cured crop of the 1945-46 season reached the high figure of 7.8 million pounds, the largest on record, and compared with 5.1 million produced in the previous year. The crops of Kentucky-seed and Bahia-seed leaf totaled 2.9 million and 2.3 million pounds, respectively.

FRUITS, VEGETABLES, AND NUTS

SPAIN'S PICKLED-OLIVE CROP SEEN DOUBLE PREWAR

Spain's pickled-olive production this year is expected to be double the prewar level. In view of the good crop prospects, shipments to this country will no doubt be confined largely to top-grade olives. Production of pickled olives in 1946 is estimated at 62,400 short tons---the largest crop since 1941-42, compared with 30,300 tons (revised) in 1945. The preliminary estimate exceeds the 10-year (1935-44) average of 28,700 tons by 117 percent.

In terms of hogshead (160 United States gallons or 960 pounds); this season's indicated production is 70,000 for Queens and 60,000 for Manzanilla for the 1945-46 season. Of the total output, 63,000 hogshead of Queens and 54,000 hogshead of Manzanilla are believed to be of suitable grade and quality for export to the United States and Canada. Last season, 21,000 hogshead of Queens and 28,720 hogshead Manzanilla were of suitable quality for export to the United States and Canada.

SPAIN: Estimated production of pickled olives,
1946-47 with comparisons
(Rounded to nearest 100 short tons)

Year	Queens	Manzanillas	Total
	Short tons	Short tons	Short tons
Average -			
1940-41/1944-45	15,300	13,800	29,100
1935-36/1944-45	15,000	13,600	28,700
1943-44	21,100	11,800	32,900
1944-45	8,600	14,400	23,000
1945-46 a/	13,100	17,200	30,300
1946-47 b/	33,600	28,800	62,400

Compiled from trade and official sources.

a/ Preliminary - revised. b/ Preliminary estimate.

Growing conditions throughout most of the area were unusually favorable, though more rain in some sections would have increased the crop. The quality of the new-crop pack is reported as average or better.

Minimum export prices were issued November 13, 1946, by the Secretary of the Grupo de Aceitunas de Verdeo at Seville as follows:

Per fanega
(16 U.S. gallons)

Queen olives, first quality, unpitted	\$28.00
Queen olives, second quality, unpitted	26.00
Queen olives, first quality, stuffed	38.00
Manzanilla olives, first quality, unpitted	28.00
Manzanilla olives, first quality, stuffed	38.00
Pitted olives, queen and manzanilla	30.00
Broken olives, queen and manzanilla	15.50
Ripe olives, "moradas"	26.00

Under a decree of the Ministry of Agriculture published September 7, 1946, growers and picklers of green olives for table use may pickle fine and semi-fine manzanilla, moron, rapazalla, and queen olives which they acquire in the Provinces of Seville, Cordoba, Malaga, and Badajoz. Queen olives may be acquired from the remaining Provinces, but it is indispensable for their transportation that they be accompanied by a certificate of the principal agronomical office in the Province in which they are cultivated. With the same type of certification, fine and semifine manzanilla olives from the Provinces of Cadiz and Huelva may also be pickled.

This decree states further that the remaining varieties of olives in all the Spanish olive-growing zone may also be pickled, but with limitations established elsewhere in the decree.

The minimum price for queen olives, sound, and of sizes not smaller than 130 olives to a kilogram (2,2046 pounds) under the decree will be 80 pesetas for 50 kilograms (approximately 40 U.S. cents per gallon). Sound, fine manzanilla olives of a size not smaller than 320 olives to a kilogram (2,2046 pounds) will be 110 pesetas for 50 kilograms (approximately 55 U.S. cents per gallon). Both prices are for olives placed at the warehouse of the buyer.

The other varieties of olives, the pickling of which is authorized, will be contracted for freely. Nevertheless, if required by the trade, the Ministry of Agriculture at the proposal of the Sindicato Vertical del Olivo, may also establish minimum selling prices for these varieties.

The Sindicato Vertical del Olivo, according to the decree, will collaborate with other competent organizations in observation of the qualities of the pickled olives exported in order to confirm that the varieties are precisely those mentioned in the contracts with foreign firms, which varieties may not be other than those authorized for exportation to each country.

A regulation by the Provincial Olive Syndicate giving the conditions for the exportation of table olives, including the minimum export prices, which is usually published each year about the same time as the decree of the Ministry of Agriculture, has not yet been published. As noted in the preceding section, however, minimum export prices have been made known to the exporters, and in clarification of the decree of the Ministry of Agriculture of August 28, 1946, the Sindicato Vertical del Olivo published a note in *El Correo de Andalucía* in Seville on September 21, 1946, to the effect that upon consultation with its office in Madrid it had ascertained that in the Provinces of Seville, Cordoba, Malaga, Badajoz, Huelva, and Cadiz no other varieties than the queen, fine and semifine manzanilla, moron, and repazalla olives may be pickled, these classes also being the only ones which may be exported.

UNITED STATES: Total imports of pickled olives,
1946 with comparisons

(Rounded to nearest 1,000 gallons)

Calendar year	Pitted or stuffed	Unpitted (In brine)	Total
	1,000 gallons	1,000 gallons	1,000 gallons
Average -			
1941-45	4,616	3,091	7,707
1936-45	3,938	3,170	7,108
1943	5,162	3,534	8,696
1944	5,168	4,654	9,822
1945	6,966	2,300	9,266
1946 a/	7,762	2,451	10,213

Compiled from Foreign Commerce and Navigation of the United States, and official records of the Bureau of the Census.

a/ Eleven months, January through November 1946.

Notwithstanding this general statement about exportation, shipment to the United States and Canada is expected to be confined, at least theoretically, to better grades such as first grade plain and stuffed queen olives, second grade plain queen olives, and first grade ("fina") plain and stuffed manzanilla olive.

Of interest to American buyers the 1946 decree differs from that regulating the 1945 crop in that last year pickling of manzanilla olives of three grades: Fine, semifine, and "basta" was permitted, while this year pickling is confined to two grades: Fine and semifine. A liberal interpretation of semifine manzanilla olives includes "hojiblancas, so unless, as in previous years, a specific ruling is made to the contrary, this inferior and cheaper type olive will probably be exported.

LIVESTOCK AND ANIMAL PRODUCTS

ARGENTINE CATTLE PRICES RETROACTIVE

The frigorificos in Argentina were notified on December 27, 1946, to buy cattle on the basis of the provisional meat prices announced on November 25 (see Foreign Crops and Markets, January 13, 1947). As expected these prices were made retroactive to October 1, 1946. The earlier announced prices were applicable only to purchases at ranches, but higher prices have been extended to purchases made at the Liniers and Rosario markets. Prices at these markets continue at 11 cents per 100 pounds below prices at ranches.

ARGENTINE EGG TRADE DECLINES

High feed costs and loss of export outlets have combined to force a rapid decline in the Argentine poultry industry. Flock numbers at the conclusion of the heavy production season (September to December) are estimated to be at least 40 percent under the level of a year earlier. In some of the commercial areas, certain producers have completely liquidated, even to selling off fence wire and shelter materials.

Early in 1946 it became apparent to commercial producers that they would be hard pressed to meet costs, and they began to reduce flocks. In September, representatives of the industry estimated that the then current price to producers for eggs of about 18 cents (U.S.) a dozen would be needed to break even. In mid-October egg prices in Buenos Aires had fallen to 13 cents and by November 1 to 11 cents. This development thoroughly discouraged producers, and chicken numbers would be lower than at present except that many flocks are small and located on farms where little time or money is expended on their management.

Exports which had exceeded 1-1/4 million cases in each of the two previous seasons did not resume with the arrival of the flush season in

September. Pending the negotiation of the general Anglo-Argentine Trade Agreement, shippers were buying eggs for storage and eventual export to the United Kingdom. In October, however, no price higher than the previous year's average of 17 cents seemed likely, and most of the holdings were diverted to the domestic market. Subsequently, remaining storage stocks were acquired by the Argentine Trade Promotion Institute, but no shipments have been made to the United Kingdom, which in 1945-46 took two-thirds of the exportable supply.

Exports of the first 6 months of the present season (July to December 1946) have totaled only 103,092 cases of shell eggs, with no shipments of dried eggs. In the same months of 1945, shell-egg exports amounted to 208,548 cases, and dried eggs brought the total up to the equivalent of 1,435,964 cases of 30 dozens each. Prospects for substantial exports in the remainder of this season are slim, as stocks held by the Institute in storage at Buenos Aires and other sources do not exceed 50,000 cases, with the flush season already past. The Institute also has about 400 tons of egg powder, roughly equal to 100,000 cases of eggs, for which few sales are reported. Asking prices were about \$1.23 per pound, f.o.b. Buenos Aires, but recently the Institute is reported to have offered the British Ministry of Food 370 tons at about \$1.00 a pound.

ARGENTINA: Exports of shell eggs, July through
December 1945 and 1946

Destination	1945 6 months	1946 6 months
	Cases a/	Cases
United Kingdom	181,609	-
Spain	9,066	22,352
Sweden	17,873	-
Belgium	-	33,485
Switzerland	-	47,255
Total	208,548	103,092

Compiled from official sources.

a/ One case equals 30 dozen eggs.

Note: Prices converted at November and December ordinary exchange rate of 4.23.

CUBAN EGG
IMPORTS SOAR

The Cuban egg situation in 1946 was featured by the heaviest importations in 20 years. The import duty of 12 cents per dozen was waived to permit imports of up to 3 million dozen, and about 2 million dozen actually were received in 1946, mostly in the fourth quarter. This compares with 166,613 dozen under similar exemption in 1945 and a prewar average of only 200 dozen annually. Importers estimate that 6 million dozen eggs could have

been sold and are urging extensions of the customs benefits in 1947 to additional quantities of eggs and to chilled poultry as well.

Imported eggs of good quality were selling in January at about 80 cents a dozen. January prices of dressed broilers were about 90 cents, and 15,000 pounds of dressed chicken from the United States was readily sold in December although the landed cost of 80 cents after payment of duties amounted to 16 cents per pound.

Poultry numbers in Cuba have been reduced as farmers sold even their breeding stock during the meat shortage. Total chicken numbers are now estimated at 9 million, compared with 10.5 million a year earlier. Egg production in 1946 is estimated to have been 25 million dozen, compared with 27 million dozen in 1945. Both years are below previous production levels. (A Foreign Agricultural Circular on the poultry and egg industry in Cuba will be available upon request about mid-February.)

AUSTRALIAN WOOL EXPORTS DOUBLE LAST SEASON'S

Australian wool exports in the first 4 months (July 1-October 31) of the current season 1946-47 increased almost 140 percent over those for a similar period last season, exceeding the average annual prewar exports for the same period by 147 percent. Reflecting the early revival of the woolen industry in Europe and resumption of competitive buying on the world market, shipments to the United States, continental Europe, and "other" countries were materially larger than a year ago, although those to the United Kingdom were smaller. Most of this wool was sold out of stock in the 1945-46 season and had not yet been exported by the end of June 1946.

Shipments of greasy and scoured wool (including relatively small quantities of tops, noils, and waste) during the 4-month period reached 490 million pounds, compared with 205 million pounds in 1945-46 and an average of 198 million pounds in the four seasons 1935-36 to 1938-39.

Exports to the United States of 156 million pounds were 126 percent above the same 4 months of the preceding season. Last season (1945-46) shipments to this country were much larger in the last half than in the first half of the season. Exports to continental Europe during the first 4 months of the current season have reached 215 million pounds. Last season in the same period they were practically nil. Shipments to continental Europe so far this season include approximately 74 million pounds to France, 67 million to Belgium, 59 million to Italy, and 10 million to Sweden. The remaining 5 million pounds designated as going to specified European countries was about equally distributed between Denmark and Spain.

The larger share of the wool going to countries designated as "Others" in the attached table was to Canada (10 million pounds) and to other foreign countries not separately designated. Shipments to Turkey, India, China, Mexico, Egypt, and Palestine were relatively small, all being under 5 million pounds each.

AUSTRALIA: Wool exports by chief destination,
July-October 1946 with comparisons
(Greasy, scoured, and washed)

Season beginning July 1	United States	United Kingdom	Con- tinental Europe	Japan	Others	Total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Average -						
1934-38	26	321	341	132	7	827
1939	17	592	188	51	14	862
1940	278	185	a/	58	16	537
1941	558	223	0	11	24	816
1942	348	184	0	0	25	557
1943	262	221	0	0	26	509
1944	255	281	0	0	26	562
1945 a/	321	260	179	0	40	806
July-October						
1945 a/	69	119	b/	b/	17	205
1946 a/	156	88	215	b/	31	490

Compiled from official sources.

a/ Includes tops, noils, and waste which cannot be separated for these seasons as yet. b/ If any, included under others.

CANADA'S WOOL CLIP
SEEN DOWN 7 PERCENT

Canada's total production of shorn and pulled wool in 1946 may approximate 18,240,000 pounds, about 7 percent less than in 1945. The shorn wool clip in 1946 is now officially estimated at 13,711,000 pounds, a decrease of 6 percent below 1945 but considerably above the unofficial estimate submitted early in 1946.

No official estimate of pulled wool is as yet available, but indications based on sheep and lambs marketings, point to a clip probably somewhat smaller than 1945 but materially above normal. In 1945, as a result of the heavy liquidation of breeding stock, pulled-wool production reached the record total of 5,113,000 pounds.

Approximately 19.5 percent of the total sheep and lambs marketed that year were adult sheep. This liquidation of sheep appears to be continuing as the percentage of adult sheep marketed in 1946 represented 18.2 percent of total sheep and lambs marketed. In normal years the marketings of adult sheep represent about 12 percent of the total, on the average.

CANADA: Wool production and related figures,
1946 with comparisons

Year	Sheep : on : farms : June 1 :	Sheep : shorn : shorn : head :	Shorn : wool : produced : pounds :	Inspected : sheep and : lamb : slaughter : head :	Pulled : wool : produced : pounds :	Total : wool : production : pounds :
1939	2,911	1,568	11,761	784	3,489	15,250
1940	2,887	1,559	11,549	765	3,346	14,895
1941	2,840	1,551	11,630	829	3,624	15,254
1942	3,197	1,669	12,867	825	3,610	16,477
1943	3,459	1,867	13,929	889	3,889	17,818
1944	3,726	2,007	15,128	949	4,151	19,279
1945	3,622	1,917	14,513	1,169	5,113	19,626
1946	3,378	1,794	13,711 :b/	1,197	:b/ 4,529	:b/ 18,240

Source: Dominion Bureau of Statistics.

a/ Revised. b/ Office estimate.

MISCELLANEOUS

BRAZIL'S COFFEE EXPORTS
LARGEST SINCE 1939

During 1946, Brazil exported approximately 15.7 million bags of green coffee, the largest amount exported since 1939. This compared with 14.2 million bags in 1945 and the 1940-44 average of 10.8 million bags. Seventy one percent, or 11.2 million bags, of Brazil's 1946 exports went to the United States; 19 percent, or 3 million bags, to Europe; 7 percent to other American countries; and the remaining 3 percent to Africa and Asia.

BRAZIL: Exports of green coffee,
1946 with comparisons

Destination	Average 1935-39	1940-44	1945 a/	1946 a/
	1,000	1,000	1,000	1,000
	bags	bags	bags	bags
United States	8,331	9,009	11,691	11,188
Other Western Hemisphere..	479	697	916	1,054
Europe	5,675	841	1,554	3,062
Africa	509	163	11	278
Asia and Oceania	98	83	-	91
Miscellaneous	3	17	-	1
Total	15,095	10,810	14,172	15,674

Compiled from official statistics and consular reports.

a/ Preliminary

The marked decrease occurring in Brazil's exports during 1940-44 was due mainly to the currying off of the European market as a result of the war. The loss of this market did not prove as disastrous as feared on account of the larger amounts of Brazilian coffee imported by the United States and other Western Hemisphere countries since 1940.

NICARAGUA'S COFFEE CROP DISAPPOINTING

The exportable surplus from Nicaragua's 1946-47 coffee crop will not exceed 180,000 bags of 132 pounds each, according to recent reports from Managua. This year's low yield is attributed to a scanty flowering last spring which was followed by a prolonged drought. Since coffee is the country's most important export crop, this year's poor outturn is causing considerable concern to Nicaraguan planters and business men. The harvest is nearly finished in the southern Departments of Managua and Carazo where about 40 percent of the total crop is produced. Picking in the northern departments of Jinotega and Matagalpa is expected to continue until March.

During 1946 Nicaragua exported approximately 197,000 bags of coffee, which was slightly below the 1941-45 average of 209,000 bags annually and substantially below the prewar (1935-39) average annual exports of 264,000 bags. In prewar years (1935-39) Europe was the principal market for Nicaraguan coffee, taking over 50 percent of the coffee exports from Nicaragua. Since 1940, Nicaragua has exported nearly all its surplus coffee to the United States.

CORRECTION: In the table of Argentine exports of specified vegetable oil-seeds and oils appearing in Foreign Crops and Markets, January 27, 1947, the figure for rapeseed-oil exports for 1943 should have read 9.2 instead of 92.0 and for January-October 1946 1.6 instead of 2.6.

LATE NEWS

(Continued from page 80)

Under a regulation of the Iranian Foreign Exchange Commission effective January 23, sterling area exchange at the rate of 130 rials (32 rials to U.S. dollar) may be sold by banks by means of documentary credits for import of the following (believed to comprise about 70 percent of present sterling area trade): Farm machinery considered useful for increasing wealth (including irrigation and agricultural pumps); sugar, tea, cotton piece goods, and industrial equipment.

The Danish-British agreement on export prices for farm products, according to Copenhagen press reports, may result in more favorable terms to Denmark than seemed possible sometime ago. One paper reported that Denmark was in a better position to gain price concessions since both Belgium and Holland are also negotiating adjustments of heavy trade balances in London and recent British purchases of Canadian bacon have been made at higher prices.

